



# **FSA Enterprise Change Management (ECM) Mod Partner Pilot Lessons Learned & FAFSA CPS & PIN Pilot Executive Orientation Briefing (updated)**

**ECM Tool Overview**

**Benefits of ECM Tool Use**

**Integrated Timeline**

**Modernization Partner Pilot Activities & Results**

**Pilot Lessons Learned**

**Next Steps for FAFSA CPS & PIN Pilot Success**

**June 3, 2002**

# FSA ECM Tool Overview



**FSA CIO sponsored the ECM Initiative** to take the first steps in the effort to deploy Enterprise Change Management (ECM), using a Tool to log, manage and track FSA's Change Management activities across application areas.

**The ECM Tool** is a Rational ClearQuest application used to manage Change Requests (CRs) submitted to the VDC from FSA Application Teams/Operating Partners.

**The ECM Tool Pilot** activities include two distinct Pilot efforts:

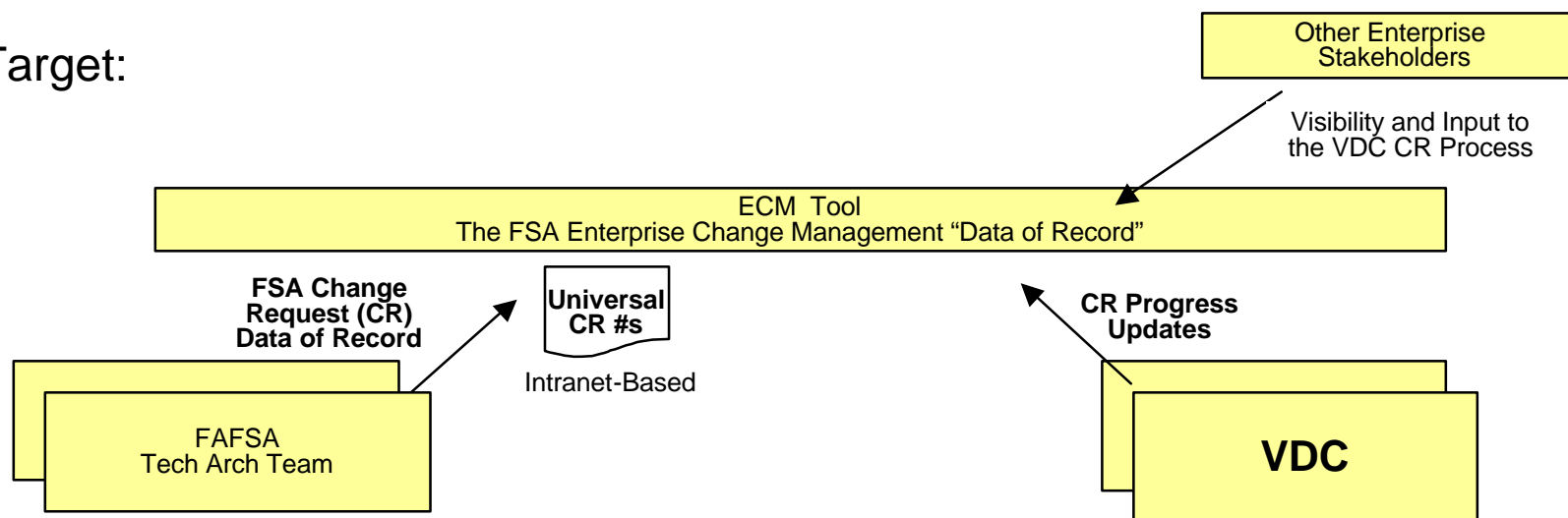
1. Modernization Partner / Development Efforts (ITA & EAI Pilot, 3/26/02 – 5/16/02) - Completed
2. Operating Partner Legacy Application Development Efforts (FAFSA CPS & PIN Pilot, 6/3/02 – 8/15/02) – Preparations underway



# Benefits of ECM Tool Use

1. Improves overall communication between Application Teams and the VDC
2. Provides “Data of Record” for FSA Enterprise Level Change Request (CR) decisions
3. Allows Application Teams visibility to entire CR process
4. Provides CR Process visibility to extended Stakeholders
5. Simplifies the Change Request process
6. Pilot Participant Teams influence the direction of the FSA ECM Tool

Target:



# Integrated Timeline

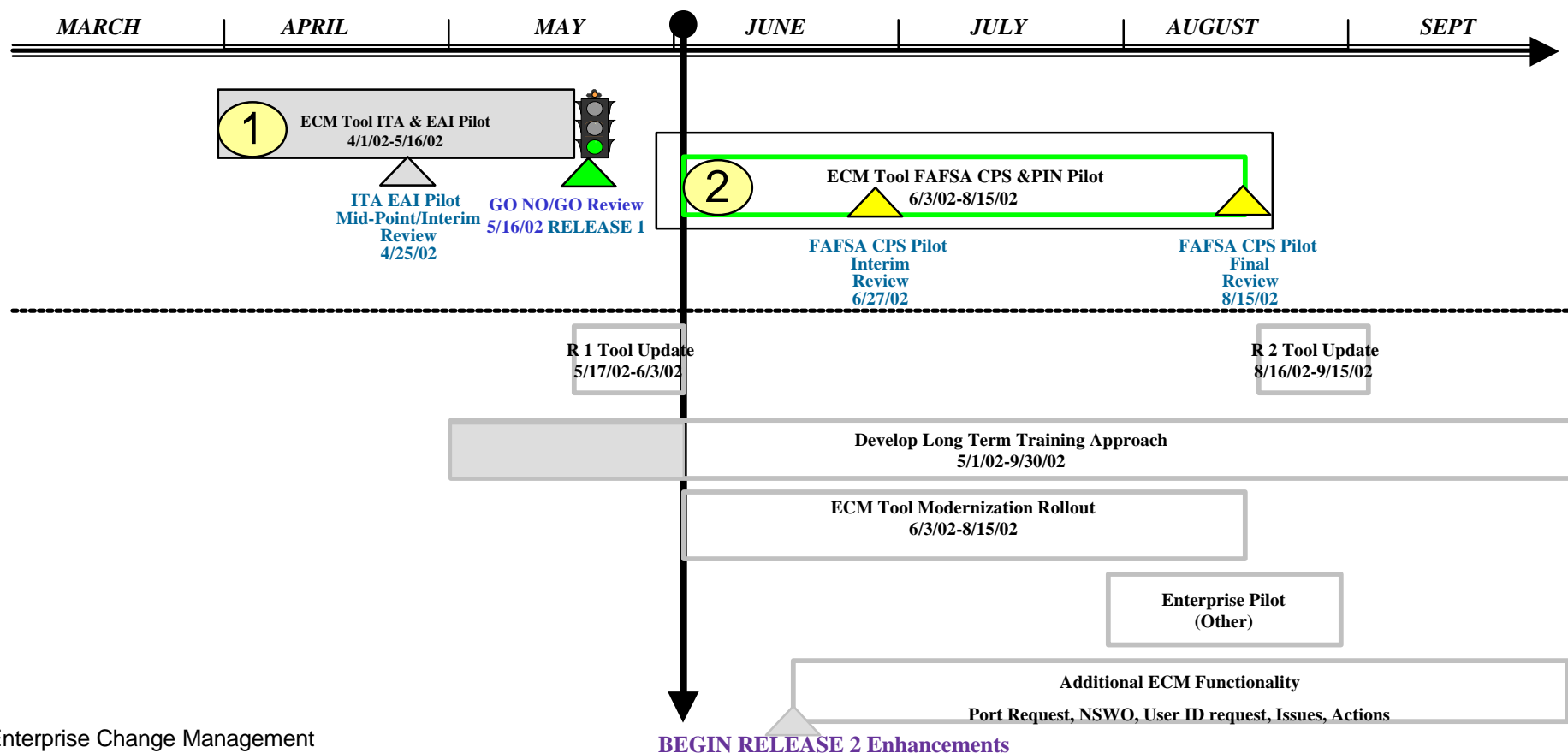


**The ECM Tool Pilot** activities include two distinct Pilot efforts:

1. Modernization Partner / Development Efforts (ITA & EAI Pilot, 4/1/02 – 5/16/02) – Completed, See # 1 below
2. Operating Partner Legacy Application Development Efforts (FAFSA CPS & PIN Pilot, 6/3/02 – 8/15/02)

– See highlighted area, #2 below

Current Date: 6/3/02



# ITA & EAI ECM Tool Pilot Activities & Results



Activity	Comments
1. Communicate Pilot Information to Stakeholders	All Stakeholders (beyond Pilot Participants) had information about the Pilot communicated to them
2. Provide Training to Pilot Participants	Training was provided to all Pilot Participants from the VDC, FSA and the Application Teams
3. Application Teams Enter Change Requests (CR) Into Tool	Total CRs entered into Tool: <ul style="list-style-type: none"> <li>•Development CRs: 11</li> <li>•Production CRs: 48</li> </ul>
4. Use and Review the ECM Tool Reports at VDC Coordination Meetings	The ECM Tool Summary Reports were consistently and effectively used to facilitate discussion of EAI and ITA CRs during the VDC Coordination Meetings
5. Establish Change Control Group (CCG) to review potential changes to the ECM Tool	CCG meets weekly to discuss potential enhancements and updates to the Tool. The CCG is comprised of members of the ECM Executive Review Committee. The CCG approves any changes to ECM Tool requirements.

# Pilot Lessons Learned



- **Close collaboration is required from the following groups:**
  - **FSA Business (Channel Leads, VDC COR)**
  - **FSA CIO ( ITS & eCAD Leads)**
  - **VDC (Service Delivery Managers and Line of Service Managers)**
  - **Applications Teams/Operating Partners (VDC Coordination POCs – e.g. Tech Arch Leads)**
  
- **Expectations regarding Tool capabilities and impacts must be realistic**
  - **Tool tracks only CRs transmitted to the VDC**
  - **Tool use will not impede Application Teams’ ability to perform internal processes**
  - **Application Team/ Operating Partner Executive understanding and support is critical**
  
- **Communication between engaged Pilot Participants is key to Pilot Success**
  - **Pilot Participants include Executives and “Daily Tool Users”**
  - **Other Stakeholders’ feedback is also critical**



# Next Steps for FAFSA CPS & PIN Pilot Success

<u>Next Step</u>	<u>Responsibility</u>	<u>Target Date</u>
1. Identify FAFSA CPS & PIN Primary Pilot Lead Executive	FAFSA/CPS Executives	6/10
2. Identify FAFSA CPS & PIN Pilot Participants	FAFSA/CPS Executives/Primary Pilot Lead	6/10
3. Demonstrate Tool for FAFSA CPS & PIN Pilot Participants	Steve Jarboe	6/10
4. Review FAFSA, CPS & Pin's existing processes	Steve Jarboe, Mike Cline	6/10
5. Test NCSP connectivity to Tool	Keith Wilson, Mike Cline, Steve Jarboe	6/10
6. Schedule Interim Executive Review Session (7/27/02 is proposed)	Cheryl Queen, Steve Jarboe, Nina Colon	6/10
7. Determine training logistics and execute training session(s)	Steve Jarboe	6/17
8. FAFSA, CPS, PIN and FSA to develop Basic Roles and Responsibilities Matrix	FAFSA/CPS Executives/Primary Pilot Lead, Ron Langkamp, John Hsu	6/24
9. Define FAFSA CPS & PIN ECM Tool Pilot Success Criteria	Steve Jarboe, Cheryl Queen, FAFSA/CPS Executives	6/27
10. Complete User ID Request Processing for Pilot Participants	Steve Jarboe, Pilot Participants	6/30

## Pilot Participants

- Jeanne Saunders\*
- Nina Colon\*
- Ida Mondragon
- David Moore\*
- Keith Wilson\*
- Cheryl Queen\*
- Phillip Wynn\*
- Slawko Semaszczuk\*
- John Hsu\*
- Dave Lass\*
- Gary Adams\*
- Mike Cline\*
- Bill Schulte\*
- Mark Snead\*
- Ron Langkamp\*
- Bruce Bruning
- Alex Lefur
- Steve Jarboe
- Robert Morse

\* Proposed Executive Review Committee Member

# Additional Slides



**Additional Slides Follow**



# Tool Automates Existing VDC Change Request Form



Existing VDC Change Request Form  
(MS Word Document)

CSC Change Request	
Please be as detailed as possible	
1a. Title of Change: Add applmgr to the mqm group	
<b>1b. Detail Description:</b> Please add the user 'applmgr' to the 'mqm' group on FMS (HPV2).  This will allow this user to use Data Integrator for file transfers.  Please send an e-mail to requestor (eric.n.suzuki@accenture.com) when this is complete.	
2. Systems affected: HPV2	
3. System Components effected: Data Integrator, MQSeries	
4. Dependencies: None	
5. Risk assessment: Low Risk	
6. Requested implementation	
Date: 03/06/2002	Time: any
7. Estimated duration of change (HH:MM): 00:30	
8. Backout/Recovery Plan: remove the user from the 'mqm' group.	
9. Estimated Backout time (HH:MM): 00:30	
10. Requester's information	
a. Requester's name: Eric Suzuki	
b. Requester's Work Phone number: 202-962-0743	
c. Requester's Pager Number:	

Continued...

Fields capture same info.

ECM Tool Web-based CR Form

Submit ChangeRequestForm VDCMP00000255

Main [Main (continued)] [Systems Affected] [Notes Log and History] [Contact Information] [Attachments]

**Main**

ID: VDCMP00000255 GCARS Reference Number:

State: Submitted

Priority: Risk Assessment

Backout/Recovery Plan:

NOTE: Format for Date-Time fields is 'MM/DD/YY HH:MM:SS'

Continued...

**Contact Information**

Requester's Information

Name-Phone: Email: Pager:

Developer's Information

Name-Phone: Email: Pager:

Assignee's Information

Name-Phone: Email: Pager:

Data Center POC

Name-Phone: Email: Pager:

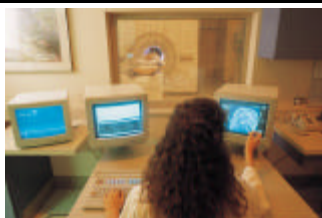
Attachments

# Tool Generates Notification Emails

## Application Teams



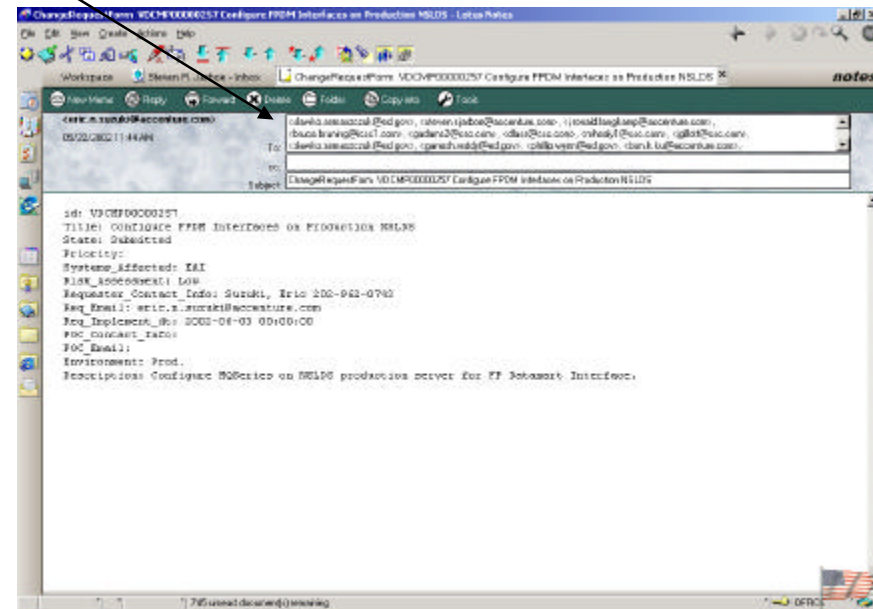
## Data Center



Appropriate Stakeholders are notified of relevant activity



## ECM Tool



# ITA & EAI Pilot Pilot Awareness



The following was sent to CIO for:

## ***CIO Top Stories***

Week ending May 24, 2002

### **Enterprise Change Management (ECM) Tool**

#### **Excerpts:**

Over the past 8 weeks, FSA CIO, the Virtual Data Center (VDC) and the Modernization Partner [EAI & ITA Application Teams] conducted a pilot for an Enterprise Configuration Management tool. The tool provides a collaborative online workspace for users to manage Change Requests (CRs) between FSA's Application Teams and the VDC in a coordinated way.

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The pilot was very successful. It demonstrated the ECM tool [which is a Rational ClearQuest Application] captures production and development change requests across the modernization and Operating Partner effort.

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A decision to proceed with the Enterprise Change Management (ECM) Tool was reached on Thursday, May 16 based on the favorable review of the pilot by the ECM Tool Executive Review Committee.

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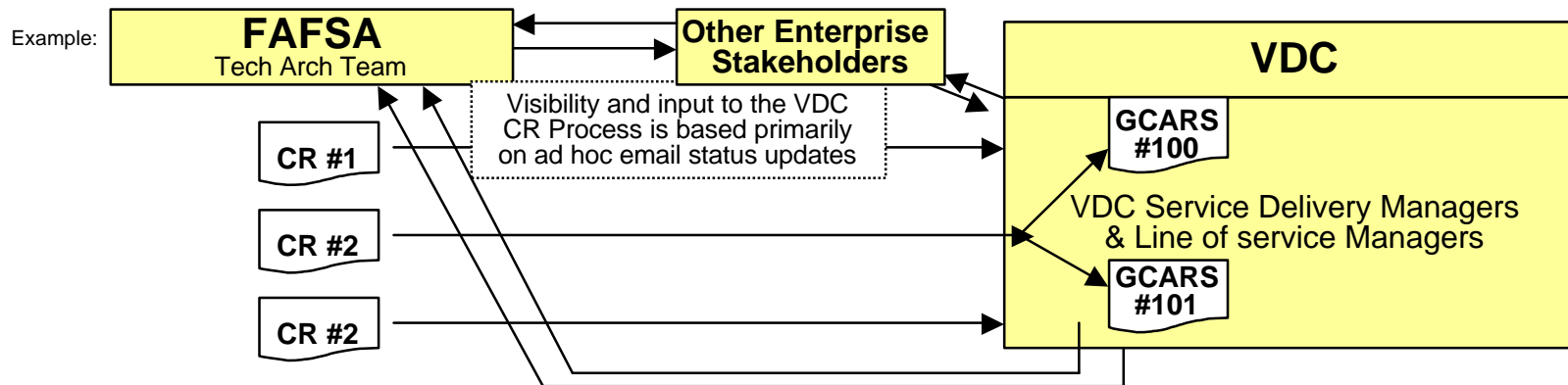
Operating Partner applications such as FAFSA and CPS will be part of the next phase of pilot activity.



# Current and Target CR FSA Change Request Process

The ECM Tool was designed to simplify the FSA Change Request Process:

Current:



Target:

